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NEWSPAPER

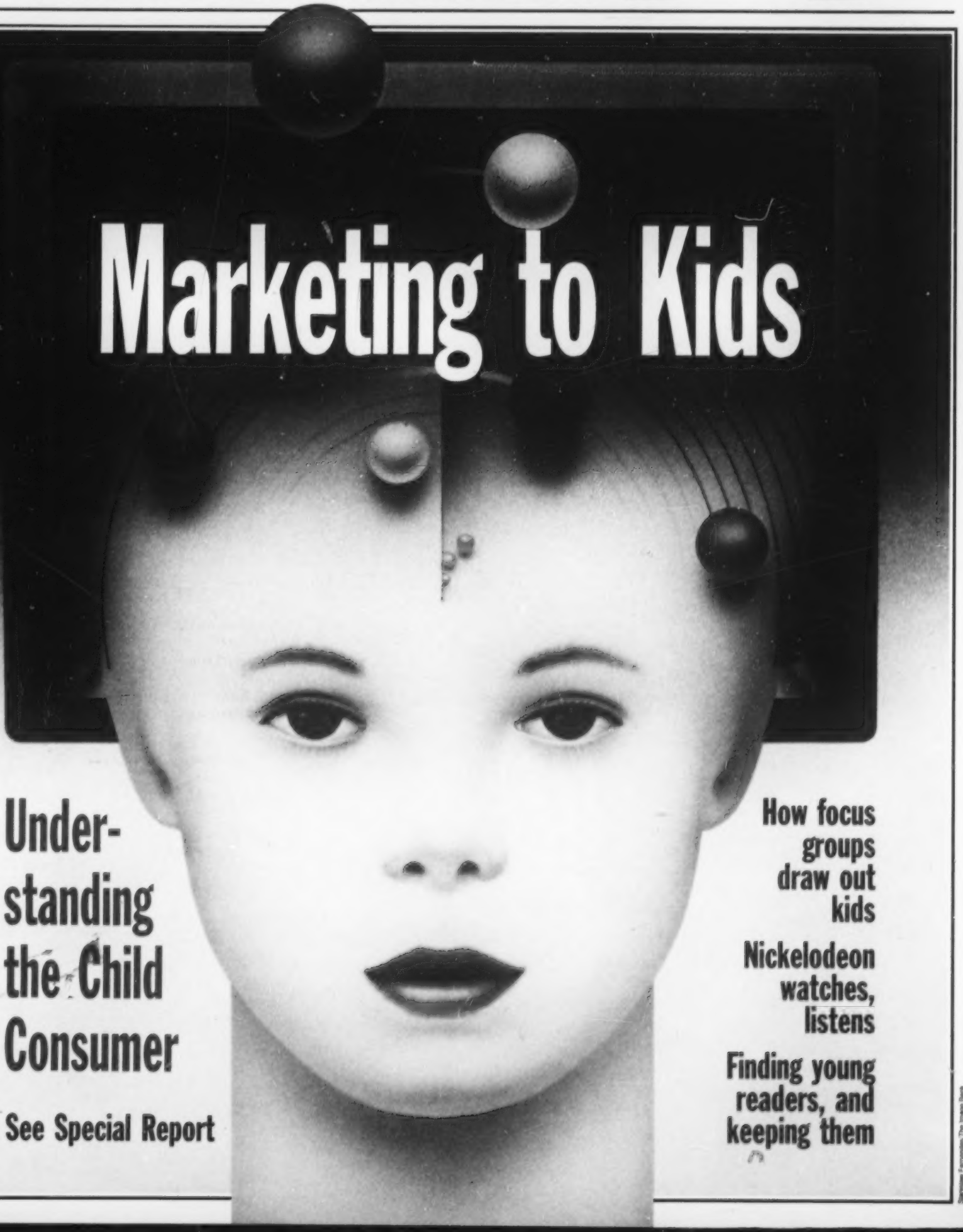
Advertising Age

February 10, 1992

by Crain Communications Inc.

Crain's International Newspaper of Marketing • In Two Sections • Section 1 • $2.50 • $3.00 in Canada • £5.00 in U.K.

Marketing to Kids



Under-standing the Child Consumer

See Special Report

How focus groups draw out kids

Nickelodeon watches, listens

Finding young readers, and keeping them

NEWS SUMMARY

- **Procter & Gamble** canceled nearly half its estimated $50 million second-quarter daytime network TV buys. 1
- **American Express** shifted its pan-European service-establishment account to Young & Rubicam. 1
- **California's** Environmental Advertising Law was challenged in court by advertising and business groups. 1
- **Hachette** signed a $10 million deal with Ford for advertising in its 84 magazines throughout the world. 3
- **Ziff-Davis** will introduce its new monthly, *Corporate Computing*, in May with a controlled circulation of 155,000. 3
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Vol. 63, No. 6—ADVERTISING AGE (ISSN 0001-8899) is published weekly (except special issues the fourth week in April, the second week in June and the fourth week in September) by Crain Communications Inc. at 740 Rush Street, Chicago, Ill. 60611-2590. Second-class postage paid at Chicago and additional mailing offices. Postmaster: Send address changes to ADVERTISING AGE, Circulation Department, 965 E. Jefferson, Detroit, Mich. 48207. $2.50 a copy, $84 a year, $134 two years. Add $151 per year for air delivery to Europe & Middle East. Add $76 for surface mail to all other foreign countries. WILLIAM STRONG, VP-circulation; DAVE KELLEY, circulation manager. Four weeks' notice required for change of address. Address all subscription correspondence to Circulation Department, Advertising Age, 965 E. Jefferson, Detroit, Mich. 48207-3185 1-800-678-9595. Microfilm copies are available from University Microfilms, 300 N. Zeeb Rd., Ann Arbor, Mich. 48103. Microfiche copies are available from Bell & Howell, Micro Photo Division, Old Mansfield Rd., Wooster, Ohio 44691. AD AGE is available for electronic retrieval on the NEXIS® Service, Mead Data Central, Inc., P.O. Box 933, Dayton, Ohio 45402 (800 227-4908).

GM turns to Japan

$8M campaign stresses quality of Cadillacs

By David Kilburn

TOKYO—General Motors Corp. hopes to polish its image in Japan by launching its most extensive TV advertising campaign ever. The U.S.-based car company plans to break an $8 million campaign here in March for the Cadillac Seville that will illustrate how well its cars can compete with Japanese models.

"Our strategy is to remove the misunderstandings about American cars," said Ichiro Sugita, GM advertising and sales promotion manager here. "We are going to communicate the quality of GM cars to the Japanese people, especially the Cadillac Seville, which is our flagship."

The GM campaign is designed to persuade skeptical Japanese consumers that the Seville, launched in November, is fully competitive in terms of fuel efficiency, fit and finish with Japanese and German luxury marques. McCann-Erickson Hakuhodo handles.

GM's Mr. Sugita said spot TV and print ads are planned, along with sports sponsorships.

Spending will depend on how many cars are sold, but the company will spend no less than $8 million, he said. The campaign will run for a year.

Total Cadillac sales in Japan were 1,000 last year, mainly Eldorado and Fleetwood models.

"This year, we have no specific [sales] target," Mr. Sugita said. "We want to sell as many as possible, and we're hoping for a 20% to 30% increase."

Mr. Sugita views upscale Japanese cars, such as Toyota Motor Corp.'s Crown and Nissan Motor Co.'s Cima, as Cadillac's main competitors.

"We are also competing with Mercedes and BMW, but our first competition is the Japanese domestic car," Mr. Sugita said. "The European cars are our secondary target."

Cadillac Seville, however, sells for about $60,000 while Toyota's Crown line is priced as low as $11,000 for some models, and as high as $50,000. Nissan's Cima line ranges from $35,000 to $50,000.

In January, 18,000 Crowns were sold, making it Toyota's best-selling line. About 4,500 Nissan Cimas are sold monthly.

"We wish GM every success with their marketing plans," said a Toyota spokesman in Tokyo.

Last year, GM sold a postwar record 10,301 cars in Japan, up about 11% from 1990. That was 5% of the imported auto market. GM also sells its Buick, Pontiac and Chevrolet lines in Japan.

German brands Mercedes-Benz, Volkswagen, BMW and Audi lead the import sector, together holding about 64% of the import market. □

AmEx's Olympics ambush may goad IOC into action

By Gary Levin

American Express Co. last week defended its ambush marketing attack on Visa International's Olympic sponsorship, but the practice is likely to lead the International Olympic Committee to review the way it sells marketing rights.

AmEx's ambush TV campaign is a response to Visa spots themed "The Olympics don't take American Express." The AmEx commercials urge viewers "going to the winter fun and games" in Albertville, France, not to believe that AmEx is excluded by area merchants, as some "bank cards" might suggest.

"They've technically not violated anything, but in our minds they've tried to create an impression," said Jan Soderstrom, senior VP-advertising and promotion at Visa USA. "What they're trying to do is clear-cut ambush marketing."

The new TV spots from Chiat/Day/Mojo, New York, don't explicitly mention the Olympics or use its symbols or logos.

AmEx said it was only reacting with "clarification advertising" to what it calls Visa's "misleading" suggestions in spots from BBDO Worldwide that imply AmEx cards aren't accepted anywhere in Albertville.

AmEx cards aren't accepted for Olympic ticket sales or by on-site merchants but are accepted by other area establishments.

"If Visa decided to file a lawsuit, we would welcome it," said Elisabeth Coleman, an AmEx spokeswoman. "We feel a public airing of the AmEx-bashing Visa ads is long overdue. We're just setting the record straight."

The IOC, which governs official sponsorships, hasn't responded to the latest AmEx salvo, said Michael Payne, its director of marketing.

But the Court of the First Instance in Paris last week fined AmEx $26,000 for unauthorized use of Olympic rings in *Expressions*, a magazine circulated to 400,000 AmEx cardmembers in Europe. The suit was filed by French Olympic organizing committees.

Still, Mr. Payne said in an earlier interview that the IOC will try to prevent ambush marketing attempts by publicizing flagrant violations. The IOC will also re-evaluate the way it sells sponsorships for the 1996 Summer Olympics, he said.

Talks center on perhaps seeking to double the price tag for worldwide The Olympic Program II sponsorships, now estimated at $20 million. In exchange, sponsors would get rights in their category to sponsor all U.S. teams, federations and pre-Olympic events, which Coca-Cola Co. has secured this year through its own negotiations.

Currently, negotiations to sponsor individual U.S. teams, for example, are handled separately. AmEx will sponsor the cycling and swimming teams this year at the Summer Olympics in Barcelona.

But some TOP II sponsors may balk at paying higher prices, since total sponsorship still doesn't prevent a competitor from advertising during the Games or using athletes or other sports motifs. □

Bill Britt contributed to this story.

Chrysler ads fight foreign brands

By Raymond Serafin

It's not "Japan bashing," but a new corporate Chrysler spot slated to break on the Winter Olympics last weekend is geared to improving its image against foreign brands.

In the spot, Chrysler Corp. Chairman Lee Iacocca acknowledges foreign competitors have been giving U.S. carmakers a beating. But he goes on to say Chrysler has restructured its way of developing product, built a $1 billion technology center and is bringing new products to market.

"In the car business, you lead, follow or get out of the way . . . and Chrysler intends to be a leader," Mr. Iacocca says in the 60-second spot.

He appears with three key new products the company is rolling out this year—the Dodge Viper sports car, Jeep Grand Cherokee sport utility vehicle and Dodge Intrepid, one of three new midsize sedans.

Bozell, New York, created the corporate campaign, part of a planned 18-month effort to establish Chrysler as an automotive leader.

"There are a lot of loyal import owners who believe the domestic Big 3 aren't capable of producing cars that have the quality and technical excellence of the Japanese," said John Damoose, Chrysler's VP-marketing. "We have to close that perception gap. With the changes we've made, we can compete with anyone in the world."

The Chrysler approach is similar in theme to several recent efforts by General Motors Corp. and its divisions. In essence, the advertising frankly acknowledges that many consumers don't have a high opinion of U.S.-nameplate vehicles, then goes on to claim the product being advertised is now a worthy competitor for the best products in the world.

A prime example of the genre is the introductory advertising for the redesigned 1992 Cadillac Seville and Eldorado models, which won critical praise from automotive journalists. □

Ninety of the 200 measured brands see their ad spending slip for the nine-month period; Kellogg nearly catches McDonald's

THE TOP 200 BRANDS

Third quarter humbles leaders

By R. Craig Endicott

The Top 200 Brands are no longer a safe haven for the nation's media.

Recession-year spending cuts by most of the players in this elite group produced an 8.5% decline in the third quarter of 1991. The three-quarter total was $10.74 billion, down 0.4% from 1990.

This dip came on the heels of a 3.6% gain in the first half of 1991, when all media spending slipped 7.8% below prior-year levels.

The nation's top advertised brand name, McDonald's restaurants, cut third-quarter spending 25.2% below levels for the previous year, to close with a $286.8 million three-quarter total. It narrowly escaped being passed by No. 2 Kellogg breakfast foods.

Kellogg Co. invested $281.3 million in the same period, including $103.6 million in the third quarter—the top volume for any brand in that period. Yet Kellogg's overall spending fell 9.2% from the year-earlier period, compared with a 15% decline for McDonald's.

Advertising Age calculates the Top 200 Brands from nine-media totals provided by LNA/Arbitron Multi-Media Service. Rankings, done quarterly, are based on year-to-date figures.

Spending cuts were rife throughout the Top 200. Ninety of the 200—from McDonald's to No. 200 Vidal Sassoon haircare products, at $21.4 million—spent less during the three quarters in 1991 than in 1990.

Among the four top media, only magazines showed a gain, up 2.8%. But spending in syndicated TV and on cable networks emerged as bright spots, with syndication growing 21.5% for three quarters among the Top 200 while cable networks gained by 18.5%.

About 54% of syndicated dollars and 40% of network cable's come from the Top 200.

Despite the humbling quarter, the Top 200 Brands still outshone all media advertising, which dropped 8.3%, to $27.2 billion, for the three periods.

A third-quarter ad erosion was never more apparent than in spending by domestic and import automakers.

Media suffered through a 15.9% decline in automobile ad spending from the 31 brands among the Top 200 in the third quarter. The quarter turned a 2.7% gain at the half-way mark in 1991 into a 3.6% decline for the nine months.

Domestic cars accounted for $1.2 billion of the category, up 0.9% from the prior year; Asian brands claimed a $910.4 million total, down 7.3%. The automobile category, with $2.4 billion in spending, contributed 26% of the Top 200's ad total for the three quarters.

Total expenditures also declined for food, retail and restaurant categories. Only entertainment, toiletries and beer among the top 10 categories boosted spending—up 6.4%, 8.8% and 20.6%, respectively.

Network TV advertising in the third quarter dropped a precipitous 12.6% for the Top 200, producing a 5.5% spending decline for the three quarters. First-half spending had been down 2.4%. Total network TV advertising declined 7.1% for the nine months.

The medium, accounting for 62% of all Top 200 spending, was paced by Kellogg with $183.9 million, down 23.4% from the prior-year. Only entertainment among the top 10 categories increased network spending, up 14.8%.

The leading brands proved far more generous toward spot TV through the first half than in the third quarter, when they trimmed spot buys by 8.8%. That drought turned a 2.9% gain by mid-1991 to a 1.4% decline for the longer period—still far better than the 7.9% decline for all advertising in the medium in the same period.

Although much has been made of the poor showing by consumer magazines in '91, they nevertheless remained relatively attractive to the Top 200 advertisers. Magazines gained 2.8% for the nine months despite a 3.2% decline in third-quarter spending from the prior year.

All magazine advertising declined 2.2% in the third quarter for a 4.8% drop in year-to-date.

Newspaper advertising remained in the doghouse, declining 6% for the Top 200, which spent 12.9% less in third-quarter 1991 than the same period in 1990. Although accounting for only 22% of all newspaper advertising, the Top 200 is critical to the medium because all newspaper advertising dropped 21.3% for the nine months.

Philip Morris Cos., while leading all advertisers in media expenditures for the three quarters at $923.7 million, was down 4.4%. Still, it maintained a substantial lead over Procter & Gamble Co. at $810.5 million, down 7.8%.

General Motors Corp. was third at $698.5 million, up 0.5%. However, GM supported its eight brands in the Top 200 with $670.2 million—the largest parent total among the Top 200. □

Top 10 companies by Jan.-Sept. ad spending

Rank	Company	Total measured ad spending 1991	1990	% chg	Ad spending by brands in Top 200 1991	1990	% chg	Number of brands
1	Philip Morris Cos.	$923.7	$965.9	(4.4)	$626.8	$627.2	0.3	8
2	Procter & Gamble Co.	810.5	879.3	(7.8)	270.0	269.7	0.1	8
3	General Motors Corp.	698.5	695.2	0.5	670.2	621.8	7.8	8
4	PepsiCo	451.5	441.7	2.2	382.0	362.0	5.5	4
5	Ford Motor Co.	333.8	354.8	(5.9)	297.7	306.6	(2.9)	2
6	Sears, Roebuck & Co.	320.5	291.2	10.1	292.3	387.5	(24.6)	3
7	Toyota Motor Corp.	318.7	434.9	(26.7)	320.0	289.9	10.4	2
8	General Mills	308.7	295.5	4.5	154.8	165.2	(6.3)	4
9	Kellogg Co.	299.9	321.8	(6.8)	281.3	309.7	(9.2)	1
10	Unilever NV	292.1	297.5	(1.8)	77.5	57.4	34.9	3

Notes: Dollars are in millions. Source: LNA/Arbitron Multi-Media Service.

Top 10 categories among Top 200 Brands in Jan.-Sept. spending

Rank	Category	Measured ad spending 1991	1990	% chg	Ad spending by media Print	Broadcast	Outdoor	Number of brands
1	Automotive	$2,391.0	$2,479.9	(3.6)	$566.1	$1,714.3	$110.5	31
2	Food	1,392.5	1,473.3	(5.5)	153.9	1,236.7	1.9	9
3	Retail (nonfood)	934.8	1,090.7	(14.3)	430.8	502.6	1.5	17
4	Restaurants	899.7	945.0	(4.8)	7.0	881.9	10.8	10
5	Entertainment & media	785.8	738.5	6.4	264.9	516.7	4.2	14
6	Beverages	489.5	528.1	(7.3)	21.9	464.9	2.7	9
7	Toiletries	484.7	445.4	8.8	133.4	351.3	0.0	15
8	Telephone	448.8	481.2	(6.7)	62.3	384.9	1.6	5
9	Beer	425.5	352.9	20.6	20.6	392.0	12.9	3
10	Airlines	334.2	339.9	(1.7)	206.0	124.5	3.8	7

Notes: Dollars are in millions. Totals include only brands from within the Top 200. Source: LNA/Arbitron Multi-Media Service.

Measured media spending for Jan.-Sept. 1991

Rank	Media	All measured brands 1991	1990	% chg	Top 200 Brands 1991	1990	% chg
1	Network TV	$6,772.7	$7,288.7	(7.1)	$4,190.8	$4,443.1	(5.5)
2	Spot TV	6,223.2	6,756.6	(7.9)	2,180.7	2,211.0	(1.4)
3	Newspaper*	5,530.4	7,027.8	(21.3)	1,214.3	1,291.9	(6.0)
4	Magazine	4,501.0	4,730.2	(4.8)	1,357.4	1,320.0	2.8
5	Syndicated TV	1,350.9	1,129.6	19.6	730.5	601.1	21.5
6	Cable TV networks	875.4	799.5	9.5	349.7	295.0	18.5
7	Spot radio	855.2	854.5	0.1	284.8	264.4	7.7
8	Network radio	578.2	561.7	2.9	275.0	236.9	16.1
9	Outdoor	514.6	509.1	1.1	147.0	120.9	21.6
	Subtotal print	10,031.4	11,758.1	(14.7)	2,571.7	2,611.9	(1.5)
	Subtotal broadcast	16,655.6	17,390.5	(4.2)	8,020.5	8,051.6	(0.4)
	Total	27,201.8	29,657.6	(8.3)	10,739.2	10,784.5	(0.4)

Notes: Dollars are in millions. * includes newspaper-distributed Sunday magazines. Source: LNA/Arbitron Multi-Media Service. AA charts: Kevin Brown

TODAY'S GERALDO:
IT'S WORTH INVESTIGATING
The investigative reporter named by a recent Magid study as one of America's most trusted journalists— have you seen him lately?
Geraldo
Up 17% with Women 18-49
and up 7% with Women 25-54

Top 200 mega-brands by Jan.-Sept. ad spending

Rank '91	Rank '90	Brand, product, service & parent company	Total measured ad spending 1991	1990	% chg
1	2	**McDonald's restaurants**, McDonald's Corp.	$266,754.5	$337,426.0	(15.0)
2	3	**Kellogg breakfast foods & snacks**, Kellogg Co.	281,252.9	309,679.9	(9.2)
3	1	**AT&T telephone svcs**, AT&T Corp.	258,893.0	345,442.7	(25.1)
4	5	**Ford cars, trucks & vans**, Ford Motor Co.	244,103.6	255,106.7	(4.3)
5	6	**Toyota cars, trucks & vans**, Toyota Motor Corp.	231,533.1	218,385.4	6.0
6	4	**Sears stores**, Sears, Roebuck & Co.	225,036.2	299,358.6	(24.8)
7	10	**Miller beer**, Philip Morris Cos.	192,449.3	140,710.9	36.8
8	7	**Chevrolet cars & trucks**, General Motors Corp.	172,711.1	195,126.0	(11.5)
9	11	**Budweiser beer**, Anheuser-Busch Cos.	155,885.0	133,024.0	17.2
10	9	**Kraft foods**, Philip Morris Cos.	150,981.3	172,274.2	(12.4)
11	13	**Pepsi & Diet Pepsi beverages**, PepsiCo	122,761.7	126,940.3	(4.8)
12	8	**Nissan cars, trucks & vans**, Nissan Motor Co.	122,197.6	176,171.7	(30.6)
13	16	**Coca-Cola & Diet Coke beverages**, Coca-Cola Co.	121,045.0	123,033.3	(1.6)
14	21	**Macy's stores**, R.H. Macy & Co.	105,801.7	97,593.3	8.4
15	20	**Buick cars**, General Motors Corp.	103,981.0	108,997.7	(4.6)
16	37	**Disney cable TV, movies, ice shows, parks**, Walt Disney Co.	101,931.6	74,018.0	37.7
17	18	**General Motors cars, trucks & vans**, General Motors Corp.	100,045.6	113,009.9	(11.5)
18	12	**Burger King restaurants**, Grand Metropolitan	98,971.3	131,900.6	(25.0)
19	31	**Dodge cars, trucks & vans**, Chrysler Corp.	96,924.9	79,836.6	23.9
20	23	**Honda cars & trucks**, Honda Motor Corp.	97,961.3	94,421.7	3.7
21	35	**Columbia movies, music**, Sony Corp.	96,822.4	75,537.1	28.2
22	15	**Kmart stores**, Kmart Corp.	96,195.5	124,773.7	(22.9)
23	28	**Pizza Hut restaurants**, PepsiCo	94,009.2	82,929.4	13.4
24	36	**Tylenol remedies**, Johnson & Johnson	91,208.2	75,333.8	21.1
25	24	**Kentucky Fried Chicken restaurants**, PepsiCo	90,152.8	88,595.6	1.8
26	41	**Oldsmobile cars**, General Motors Corp.	88,995.8	70,394.4	26.4
27	30	**Lexus cars**, Toyota Motor Corp.	88,468.9	71,489.0	23.8
28	19	**American Express financial svcs**, American Express Co.	88,387.7	112,622.0	(21.5)
29	27	**American Airlines**, AMR Corp.	88,196.8	83,444.9	5.7
30	45	**Delta Air Lines**, Delta Air Lines	87,272.2	67,809.9	28.7
31	14	**Mazda cars & trucks**, Mazda Motor Corp.	86,650.6	128,200.6	(32.4)
32	30	**Post cereals**, Philip Morris Cos.	85,630.6	80,708.4	6.1
33	55	**Circuit City Stereo Stores**, Circuit City Stores	81,357.9	61,200.9	32.9
34	43	**Marlboro cigarettes**, Philip Morris Cos.	80,632.1	68,588.0	17.6
35	103	**MCI telephone svcs**, MCI Communications Corp.	79,192.2	37,338.6	112.1
36	50	**Nike footwear & sportswear**, Nike Inc.	78,547.2	62,534.9	25.6
37	29	**Wrigley's gums**, Wm. Wrigley Jr. Co.	77,715.7	81,639.2	(4.8)
38	33	**Coors beer**, Adolph Coors Co.	77,198.7	79,125.0	(2.4)
39	38	**Acura cars**, Honda Motor Corp.	76,805.3	73,366.4	4.7
40	73	**20th Century Fox movies & video**, News Corp.	76,495.6	47,227.7	62.0
41	17	**Chrysler cars**, Chrysler Corp.	75,079.7	117,968.4	(36.4)
42	54	**Taco Bell restaurants**, PepsiCo	75,073.4	61,568.5	21.9
43	26	**Warner books, movies, records, video**, Time Warner	72,359.5	84,272.9	(14.1)
44	25	**Nabisco foods**, RJR Nabisco	72,229.5	85,776.3	(15.8)
45	46	**Ultra Slim-Fast diet, Slim-Fast Food Co.**	70,798.4	65,287.5	8.4
46	47	**Wendy's restaurants**, Wendy's International	68,145.0	65,186.0	4.5
47	32	**Universal City studios**, Matsushita Electric Industrial Co.	66,386.2	79,409.2	(16.4)
48	40	**Paramount movies & video**, Paramount Communications	65,846.2	70,648.3	(6.8)
49	51	**Mercedes-Benz cars**, Daimler-Benz AG	64,072.2	62,480.8	2.5
50	22	**J.C. Penney's stores**, J.C. Penney Co.	63,568.5	94,478.7	(32.7)
51	53	**U.S. dairy products**, U.S. dairy farmers	61,438.4	61,683.1	(0.4)
52	59	**L'Oreal cosmetics**, Nestle SA	60,785.3	58,781.2	3.4
53	NA	**Saturn cars**, General Motors Corp.	59,890.3	279.7	21,240.8
54	60	**Pontiac cars, trucks & vans**, General Motors Corp.	57,626.2	57,203.5	0.7
55	66	**Prudential insurance**, Prudential Insurance Co.	57,164.4	49,413.2	15.7
56	48	**Touchstone films & video**, Walt Disney Co.	56,831.1	64,941.4	(12.5)
57	62	**Domino's Pizza**, Domino's Pizza	56,322.5	56,191.1	0.2
58	76	**Isuzu cars & trucks**, Isuzu Ltd.	54,469.8	46,429.6	17.3
59	64	**Mercury cars**, Ford Motor Co.	53,616.5	51,502.1	4.1
60	93	**HBO cable TV**, Time Warner	52,725.8	40,388.2	30.5
61	70	**BMW cars**, BMW AG	52,329.3	47,696.5	9.7
62	90	**Franklin Mint**, American Protection Industries	52,196.7	41,837.6	24.8
63	66	**Mitsubishi cars & electronics**, Mitsubishi Motors Corp.	52,024.9	50,650.8	2.7
64	52	**Hyundai cars, computers**, Hyundai Group	51,312.7	62,358.4	(17.7)
65	44	**Folgers coffees**, Procter & Gamble Co.	50,907.4	68,503.9	(25.7)
66	69	**US Sprint telephone svcs**, United Telecommunications	50,505.5	48,331.0	4.5
67	61	**Kodak cameras, film, copiers**, Eastman Kodak Co.	50,464.2	45,322.4	11.3
68	106	**Cadillac cars**, General Motors Corp.	50,092.7	36,387.6	37.7
69	56	**Cheerios cereal**, General Mills	50,038.3	60,885.1	(17.8)
70	58	**Citibank financial svcs**, Citicorp	49,670.1	60,102.5	(17.4)
71	99	**Lender food stores**, American Stores Co.	49,414.3	37,983.7	30.1
72	57	**Subaru cars**, Fuji Heavy Industries	49,023.5	60,292.7	(18.7)
73	72	**Cover Girl cosmetics**, Procter & Gamble Co.	49,008.5	47,267.7	3.7
74	78	**Red Lobster restaurants**, General Mills	48,881.4	46,159.9	5.9
75	133	**Reebok footwear**, Reebok International	47,218.1	30,785.7	53.4
76	136	**Johnson & Johnson baby & health prods**, Johnson & Johnson	46,680.6	29,676.4	57.3
77	67	**Hallmark stationery & gifts**, Hallmark Cards	45,362.0	50,492.9	(10.2)
78	87	**Tri-Star pictures**, Sony Corp.	45,236.2	42,887.6	5.5
79	604	**Gateway PC, Packard Bell PC**, Gateway Educational Products	45,233.4	8,309.3	444.4
80	79	**Advil & Coadvil remedies**, American Home Products Corp.	44,958.8	46,027.1	(2.3)
81	49	**United Airlines**, UAL Corp.	44,107.8	63,179.2	(30.2)
82	61	**Goodyear tires & stores**, Goodyear Tire & Rubber Co.	43,634.6	56,727.0	(23.1)
83	80	**Little Caesar pizza**, Little Caesar Enterprises	43,537.8	42,077.9	3.5
84	107	**Wal-Mart stores**, Wal-Mart Stores	43,065.9	35,908.5	19.9
85	42	**Montgomery Ward stores**, Montgomery Ward & Co.	41,783.0	69,650.6	(40.0)
86	101	**Orion pictures & video**, Orion Pictures Corp.	41,707.5	37,616.3	10.9
87	83	**Wilkes Bashford stores**, Whitman Corp.	41,579.2	43,792.3	(5.1)
88	138	**Kleenex paper products**, Kimberly-Clark Corp.	41,439.6	28,951.2	43.1
89	34	**Maxwell House coffees**, Philip Morris Cos.	40,337.8	75,573.6	(46.6)
90	113	**UPS air freight**, United Parcel Service of America	39,100.6	33,961.6	15.1
91	100	**Dr Pepper & Sugar Free Dr Pepper**, Dr Pepper/Seven-Up Cos.	38,490.2	25,880.4	48.7
92	74	**May Co. stores**, May Department Stores Co.	38,250.9	46,697.6	(18.1)
93	116	**Hardee's restaurants**, Imasco	37,873.6	32,964.8	14.9
94	153	**Vons markets**, Vons Cos.	37,822.6	26,247.5	44.1
95	122	**Johnson's products, waxes & cleaners**, S.C. Johnson & Son	37,396.4	32,148.9	16.3
96	71	**Tide laundry products**, Procter & Gamble Co.	37,292.5	47,367.0	(21.3)
97	77	**Time-Life books & video**, Time Warner	37,188.8	46,245.2	(19.6)
98	108	**Gillette shaving products**, Gillette Co.	37,157.0	35,561.8	4.5
99	94	**Geo cars & trucks**, General Motors Corp.	37,043.3	40,383.4	(8.3)
100	100	**Visa charge card & traveler's checks**, Visa International	36,206.0	37,667.4	(3.9)

Rank '91	Rank '90	Brand, product, service & parent company	Total measured ad spending 1991	1990	% chg
101	104	**Jeep trucks & vans**, Chrysler Corp.	$36,184.3	$36,584.4	(1.1)
102	112	**Canon electronics**, Canon Inc.	35,343.1	34,036.9	3.8
103	96	**True Value stores**, Cotter & Co.	35,274.3	39,183.6	(10.0)
104	116	**Tropicana juices**, Seagram Co.	35,029.2	33,155.0	5.7
105	95	**Broadway stores**, Carter Hawley Hale Stores	34,867.5	39,316.0	(11.3)
106	236	**USAir airline**, USAir Group	34,837.8	20,053.9	73.7
107	131	**Crest toothpaste**, Procter & Gamble Co.	34,736.9	30,906.6	12.4
108	65	**Allstate insurance**, Sears, Roebuck & Co.	34,566.9	50,710.6	(31.8)
109	89	**Clairol haircare products**, Bristol-Myers Squibb Co.	34,358.0	41,364.9	(17.0)
110	NA	**Monistat 7 vaginal yeast cream**, Johnson & Johnson	34,164.7	0.0	NA
111	86	**Du Pont products**, Du Pont Co.	33,933.3	43,029.4	(21.1)
112	148	**Texaco gasoline & oil**, Texaco Inc.	33,678.6	27,236.7	23.7
113	98	**Worsted separates**, Loewe Corp.	33,056.4	38,689.0	(14.6)
114	391	**Federal Express air cargo**, Federal Express Corp.	32,964.6	12,698.7	159.6
115	270	**Purina pet foods**, Ralston Purina Co.	32,914.1	17,790.5	84.9
116	102	**Discover credit card service**, Sears, Roebuck & Co.	32,681.3	37,418.8	(12.7)
117	119	**Lysol cleaners**, Eastman Kodak Co.	32,676.5	32,927.3	(0.8)
118	475	**Winston cigarettes**, RJR Nabisco	32,254.9	10,513.6	206.8
119	139	**7-Eleven food stores**, Southland Corp.	31,827.6	28,667.6	11.0
120	117	**7UP & Diet 7UP beverages**, Dr Pepper/Seven-Up Cos.	31,653.3	33,002.2	(4.1)
121	164	**Oil of Olay creams & lotions**, Procter & Gamble Co.	31,335.9	25,133.5	24.7
122	255	**Lipton foods**, Unilever NV	31,270.2	18,658.1	67.6
123	166	**GTE telephone svcs**, GTE Corp.	31,106.4	24,813.8	25.4
124	97	**Nutri/System weight loss centers**, Nutri/System Inc.	30,901.0	38,836.6	(20.4)
125	171	**State Farm insurance**, State Farm Auto. Ins. Co.	30,884.5	24,580.2	25.6
126	109	**IBM computers**, IBM Corp.	30,710.1	35,345.7	(13.1)
127	170	**Alka-Seltzer remedies**, Bayer AG	30,650.7	24,644.3	24.4
128	82	**U.S. Army**, U.S. Government	30,485.8	44,207.9	(31.0)
129	201	**Mattel toys**, Mattel Inc.	30,193.1	22,322.5	35.3
130	161	**Neutrogena toiletries**, Neutrogena Corp.	30,146.3	25,567.0	17.9
131	191	**Hertz car rental**, Park Ridge Corp.	30,129.6	23,338.5	29.1
132	114	**Keebler cookies & crackers**, United Biscuits (Holdings)	30,068.6	33,339.3	(9.8)
133	123	**Continental Airlines**, Continental Airlines Holdings	29,767.8	31,912.0	(6.7)
134	149	**Clorox cleaners**, Clorox Co.	29,480.3	27,194.7	8.4
135	196	**Jenny Craig weight loss centers**, Jenny Craig	29,415.5	22,725.1	29.4
136	132	**Jell-O desserts**, Philip Morris Cos.	29,253.8	30,817.7	(5.1)
137	163	**Pacific Bell telephone svcs**, Pacific Telesis Group	29,141.7	25,229.2	15.5
138	129	**Total cereal**, General Mills	28,981.7	31,306.7	(7.4)
139	177	**Blue Cross & Blue Shield**, Blue Cross & Blue Shield	28,944.6	24,218.2	19.5
140	105	**Levi's sportswear**, Levi Strauss & Co.	27,935.9	36,534.4	(23.5)
141	126	**Oscar Mayer meats & foods**, Philip Morris Cos.	27,476.2	31,563.2	(12.9)
142	152	**Betty Crocker foods**, General Mills	26,855.9	26,801.5	0.2
143	200	**Sprite & Diet Sprite beverages**, Coca-Cola Co.	26,841.2	22,406.9	19.8
144	145	**Excedrin pain relievers**, Bristol-Myers Squibb Co.	26,786.2	27,912.5	(4.0)
145	130	**Campbell soups**, Campbell Soup Co.	26,739.9	31,290.1	(14.5)
146	336	**Bradford Exchange collectibles**, Bradford Exchange	26,512.9	14,612.0	81.4
147	92	**Northwest Airlines**, NWA Inc.	26,356.2	41,272.5	(36.1)
148	246	**Home Depot Do-It Yourself store**, Home Depot	26,330.2	19,055.8	38.2
149	141	**NBC-TV network**, General Electric Co.	26,225.5	28,629.8	(8.4)
150	85	**GE appliances**, General Electric Co.	26,056.8	43,192.3	(39.7)
151	143	**Royal Caribbean cruise line**, Royal Caribbean Cruise Line	25,906.7	28,180.7	(8.1)
152	181	**Mervyn's stores**, Dayton Hudson Corp.	25,895.5	24,020.1	7.8
153	245	**Aussie pain reliever**, American Home Products Corp.	25,802.4	19,119.0	35.0
154	331	**Del Monte fruits & vegetables**, Del Monte Corp.	25,711.5	14,757.0	74.2
155	229	**Florida citrus fruits & juices**, State of Florida	25,375.8	20,478.9	23.9
156	NA	**Gyne-Lotrimin cream**, Schering-Plough Corp.	25,300.1	0.0	NA
157	120	**Target stores**, Dayton Hudson Corp.	25,070.5	32,315.1	(22.4)
158	203	**Holiday Inn hotels**, Bass PLC	25,065.0	22,042.2	13.7
159	91	**Weight Watchers diet & foods**, H.J. Heinz Co.	25,009.7	41,836.6	(40.2)
160	235	**Camel cigarettes**, RJR Nabisco	24,823.4	20,132.1	23.3
161	194	**NutraSweet sweetener**, Monsanto Co.	24,701.4	22,815.3	8.3
162	NA	**Dynatrim diet drink mix**, American Cyanamid Co.	24,658.1	0.0	NA
163	223	**Vaseline products & lotions**, Unilever NV	24,638.8	20,770.1	18.6
164	259	**Fox TV network**, News Corp.	24,572.4	18,476.4	33.0
165	137	**Lane Crawford specialties stores**, U.S. Shoe Corp.	24,302.5	29,670.5	(17.8)
166	63	**Volkswagen cars**, Volkswagen AG	24,306.6	55,971.2	(56.6)
167	349	**Ralston batteries & flashlights**, Ralston Purina Co.	24,202.8	14,224.5	70.8
168	154	**Head & Shoulders haircare**, Procter & Gamble Co.	23,848.6	26,092.6	(8.6)
169	124	**Colgate toothpaste & toothbrushes**, Colgate-Palmolive Co.	23,782.7	31,874.1	(25.4)
170	287	**Ralph's food stores**, Ralph's Grocery Co.	23,695.5	16,988.6	39.5
171	121	**Pan Am airlines, Pan American World Airways**	23,694.0	32,253.8	(26.5)
172	140	**Plymouth cars, trucks & vans**, Chrysler Corp.	23,659.6	28,649.7	(17.4)
173	165	**Quaker Oats cereals**, Quaker Oats Co.	23,617.1	25,093.8	(5.9)
174	185	**Winn-Dixie food stores**, Winn-Dixie Stores	23,578.4	23,636.4	(0.2)
175	197	**Blockbuster videos**, Blockbuster Entertainment Corp.	23,529.3	22,639.4	3.9
176	237	**Upjohn Co. general promotion**, Upjohn Co.	23,193.5	19,997.9	16.0
177	267	**Publishers Clearing products**, National Syndications	23,153.3	18,091.0	28.0
178	415	**Arm & Hammer baking soda products**, Church & Dwight Co.	23,145.1	11,938.5	93.9
179	168	**Estee Lauder cosmetics**, Estee Lauder Inc.	23,089.3	24,726.2	(6.7)
180	115	**Kroger food stores**, Kroger Co.	23,024.8	33,202.6	(30.7)
181	232	**Mobil gasoline & oil**, Mobil Corp.	22,985.5	20,191.8	13.8
182	75	**Stouffer's foods & hotel**, Nestle SA	22,902.1	46,498.3	(50.7)
183	125	**Hershey foods**, Hershey Foods Corp.	22,830.8	31,661.8	(27.9)
184	292	**Alamo car rental**, Alamo Rent-a-Car	22,762.1	16,737.9	36.0
185	110	**Pearle Vision Centers**, Grand Metropolitan	22,609.9	35,294.8	(35.9)
186	273	**Minute Maid juice & beverages**, Coca-Cola Co.	22,435.2	17,560.1	27.8
187	280	**Anderson doors & windows**, Anderson Corp.	22,407.3	16,897.4	32.6
188	195	**Mennen men's & baby's toiletries**, Mennen Co.	22,302.1	22,747.6	(2.0)
189	182	**L.A. Gear sporting footwear, L.A. Gear**	22,176.5	24,007.0	(7.6)
190	151	**General Foods int'l coffee & foods**, Philip Morris Cos.	22,081.5	26,951.5	(18.1)
191	202	**U.S. Postal Service**, U.S. Government	21,870.6	22,108.1	(1.1)
192	192	**Benadryl remedies**, Warner-Lambert Co.	21,843.5	22,868.6	(4.5)
193	206	**Carnival Cruise Lines**, Carnival Cruise Lines	21,832.7	21,783.2	0.2
194	241	**Abraham & Straus stores**, Federated Department Stores	21,816.7	19,524.0	11.7
195	256	**Dove creams**, Unilever NV	21,564.1	18,556.5	16.2
196	300	**Pillsbury baking products**, Grand Metropolitan	21,515.0	16,466.9	30.7
197	326	**Oil of Olay men's toiletries**, Procter & Gamble Co.	21,490.7	15,377.8	139.8
198	162	**Beef Industry Council**, Beef Industry Council	21,464.5	25,440.7	(15.6)
199	142	**ABC-TV network**, Capital Cities/ABC	21,452.7	28,211.2	(24.0)
200	306	**Vidal Sassoon haircare products**, Procter & Gamble Co.	21,383.5	16,035.5	33.4

Notes: Dollars are in thousands. Measured media spending includes magazine; Sunday magazine; newspaper; outdoor; network, spot, syndicated and cable TV; spot and network radio. Source: LNA/Arbitron Multi-Media Service. See story on Page 12.

AA chart: Kevin Brown

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LETTERS

Faith restored

I was beginning to believe that reason no longer pertained in the dialogue about political advertising and that shrillness was to be the deciding factor.

Then I read your lead editorial ("Quit the mudslinging," AA, Jan. 27) and my faith was restored. Thank you.

John O'Toole
President, American Association of Advertising Agencies
New York

Loose cannons

Alex Kroll has it right when he "castigates" political advertising. Much of it is terrible. And if we needed more convincing, all we had to do was read some of the responses from political consultants (AA, Jan. 20). Such wholesome rhetoric as "This letter will be a shot across the bow . . . if they want war we'll give it to them." Or "some of the obscene stuff they do," with threats of launching a "broadside." Yep, that's about the level of discourse we'd expect.

Political advertising and such eager-to-fight swashbucklers are loose cannons on the ship of state —harmful to advertising and, worse, to the country, its citizens and voters.

Henry B. Hager
Professor of advertising
University of Missouri
Columbia

Regulate cigarette ads

We commend *Advertising Age* for its editorial, "Old Joe must go" (AA, Jan. 13), which clearly communicated its conviction that "sprightly cartoon ads like the ones featuring Old Joe" for R.J. Reynolds' Camel cigarettes "encourage youngsters to smoke." RJR has repeatedly denied that charge. You had the courage to tell them they are wrong and should drop the campaign. . . .

The Joe Camel campaign is probably in a class by itself in the annals of poor taste in advertising, but it is only the most extreme example of the inherent dangers of allowing a known hazardous consumer product to be advertised without federal regulations or oversight. . . .

Our federal government must step in now and regulate the advertising, sale, distribution and manufacture of cigarettes in the way it currently does for prescription drugs, foods and even innocuous consumer products like toothpaste and lipstick. Tobacco advertising in particular should not be given such extraordinary First Amendment protection when other legal commercial products are not.

Scott D. Ballin
Coalition on Smoking or Health
Washington

Julia believes in love

Your report on magazine covers (AA, Jan. 20) was not accurate. The coverline "Julia in love," on *Ladies' Home Journal's* July cover, which also features a picture of Ms. Roberts, was not a caption but was, in fact, part of a direct quote of hers. "I believe in love," she said, which I'm sure remains Ms. Roberts' sentiment even after the breakup of her engagement.

By the way, it was an issue that sold well on the newsstand.

Myrna Blyth
Publishing director
Ladies' Home Journal
New York

FREEZE FRAME

Toe much to drink?

This is most definitely *not* an ad we can do without. We could do with a lot more of these.

Where else do we find a ravishing bride, apparently half blind from drinking too much B&B brandy . . . who also happens to have six toes (inset)?

Is this a great drink or what?

Jerry Dyer
Communications manager
Topflight Corp.
York, Pa.

Size doesn't count

Your story relating to the Alcone Sims O'Brien merger (AA, Dec. 23) just may vie for the "hot air" award of 1991 concerning sales promotion agencies.

During our 21 years in business, having clients among the top 400 marketers as well as smaller regional companies, never has the size of our staff, the amount of our billings or how large is our office space been a factor in winning and keeping clients.

We love to hear our competitors brag about their "size," especially when our own success has been in attaining new clients, and keeping them, from the so-called "big" sales promotion agencies.

Tom Watson, president of Omnicom's Diversified Agency Services, the controlling parent of the merger, is quoted in *Ad Age* that "we would have to be at least talked to by major national marketers." With reference to his assumption that the size of the merged shop will have the phones ring off their hooks—that is a fantasy.

Ronald Smiley
President, Smiley Promotions
New York

Clinton review missed point

Bob Garfield may have missed one point about Bill Clinton's direct response ad in the Political Ad Review (AA, Jan. 13).

The mere fact that Gov. Clinton is offering his "Plan for America's Future" to voters via an 800 number puts him way ahead of most political advertisers. And he's apt to be pleased with the technique of direct response, since 1,300 New Hampshire residents phoned for the Clinton plan on the first two days the commercial was on the air.

When was the last time we saw an 800 number in a political ad that was for anything other than raising funds for the candidate's campaign?

Ruth Wooden
President, The Advertising Council
New York

Poll conclusions wrong

I wish to comment on the unwarranted conclusions in your story "Poll: Ads strain credibility" (AA, Dec. 16).

You reported that, "In a third-quarter telephone survey by Video Storyboard Tests, seven out of 10 respondents said they believe few, if any, of the ads they see on TV or in print." According to the accompanying chart, they said no such thing. A large majority of 72% responded that "only some ads are believable." As this is incontrovertibly true (unless *all* ads are untrue), it is not surprising to me that most respondents agreed with the statement.

These two conclusions are supported: 1) Only some ads are true, and 2) consumers know this. These two conclusions do seem to merit greater attention by persons in advertising.

Winston Ring
Professor, University of Wisconsin-Milwaukee

Cindy equals advertising

Let's hope Bob Garfield is being ironic when, in his review of the New Look of Pepsi commercial (AA, Jan. 13), he writes, "Not incidentally, every time you see this new logo you will conjure up Cindy Crawford. And that, I believe, is advertising."

Funny, but I thought Pepsi was in the business of selling soft drinks, not supermodels. The selection of Mrs. Richard Gere to introduce the new Pepsi graphics represents an ideal marriage of celebrity and product. Cindy Crawford represents an all-American standard of desirable beauty—exactly the image Pepsi wants to create for its new package.

Not incidentally, every time you see Cindy Crawford on the cover and in the pages of countless magazines, you will conjure Pepsi. And *that*, I believe, is advertising.

Sheraton S. Kalouria
Grey Advertising
New York

The Cindy Crawford commercial on behalf of the new Pepsi logo didn't send me into the swooning mood Mr. Garfield seemed to experience. In fact, the commercial seemed such a blatant attempt to sell products via sex that it made me think that Mr. Garfield very well may need a break from viewing commercials. Or maybe he just needs a date.

Unlike Mr. Garfield, every time I see the new Pepsi logo I don't think of Ms. Crawford or her supposed goddesslike qualities. Instead, I think, "What an ugly logo."

Michael Weil
Berkeley, Calif.

CORRECTIONS & CLARIFICATIONS

■ Outlet project space for malls and strip centers grew last year to 34 million square feet in 276 projects, from 22.2 million square feet in 188 projects at the beginning of 1989, not the beginning of 1990 as was reported (AA, Jan. 27, P. S-5).

■ Joseph P. Caponigro's new position at BBDO Worldwide, Southfield, Mich., is senior VP-director of media services (AA, Jan. 27, P. 33).

■ Martin Miller, Mattel senior VP-marketing research and media, denies that Mattel already has concluded new upfront cable deals for the 1992-93 TV season (AA, Dec. 16, P. 1). Mr. Miller said the Mattel buys referred to in the "early upfront" article remain part of existing multiyear options.

■ Dentsu, Young & Rubicam, Tokyo, had 1990 billings of $281.9 million, not $218.9 million (AA, Jan. 20, P. 42).

■ Tom Senatori of Waldbillig & Besteman designed the posters shown in Photo Review (AA, Jan. 13, P. 40), not Robert D'Angelo. □

Al Gore
New Republic
Subscriber #10,049

'Addicted' to research, Nick shows strong kids' lure

Agency exec says net hits the hot button

By Joseph M. Winski

Geraldine Laybourne cherishes the moment.

She was at a newsstand in the Newark, N.J., airport. A boy examining a kids' magazine asked his mother if she thought the magazine would be funny enough.

"If Nickelodeon did a magazine, would it be funny enough?" Ms. Laybourne asked the boy. "You bet," he responded.

Ms. Laybourne is president of Nickelodeon, the cable TV network for kids—and of Nick at Nite, its nighttime partner.

For her, the incident confirmed once more what a growing number of media and marketing folks also have come to believe: When it comes to kids, few organizations know them better than the Viacom-owned Nick.

In a survey conducted last year for the network by Yankelovich Clancy Shulman, a national sample of Nickelodeon viewers was asked if the network understood kids; 93% said yes.

"I like to say the other 7% just didn't understand the question," Ms. Laybourne says, exhibiting a touch of the sass and wit that characterize her network from programs to promos.

Advertisers agree.

Ad revenues of Nickelodeon/Nick at Nite jumped 34% to $78.5 million last year, according to TV industry consultant Paul Kagan & Associates. The cable network's total revenues rose 21% to $167.5 million.

"Nickelodeon certainly makes it their business to know kids and get inside their heads," says Mark Mears, Pizza Hut's director of kids/entertainment marketing.

Pizza Hut is so taken with the network's ability to connect with its audience it has "adopted the Nickelodeon attitude, if you will, in our efforts to reach kids," says Mr. Mears.

Pizza Hut has advertised on the network for three years, and last month staged a successful promotion of its kids' pizza-pack (complete with Slime pudding) tied to the new animated shows, Mr. Mears says.

"I think they're doing all the right things," says Jack Irving, exec VP-director of media operations for Saatchi & Saatchi Advertising, New York. He's especially impressed with Nickelodeon's ability to "develop tremendous promotions [for advertisers] that really talk the kids' language, that really hit some hot buttons."

To accomplish that end, Nickelodeon has made research a top priority. It does considerable quantitative research, such as Yankelovich's annual Youth Monitor, and smaller tracking studies. But its primary research vehicle is the focus group.

Last year, Nickelodeon says, it conducted 200 to 250 focus groups with kids, which may be the most of any organization targeting the kids' market.

Many are held in facilities built expressly for focus groups at the network's huge studios at Universal Studios Florida in Orlando, where kids are pulled from tour groups and given a Nick T-shirt for their thoughts.

Ms. Laybourne, who calls research "addictive," attends focus groups, as do others involved in Nickelodeon programming. Focus groups near the New York headquarters frequently have more people watching from behind the one-way mirror than the six to 10 kids who normally participate, Nickelodeon staffers say.

It was early research that shaped the very essence of Nickelodeon: a saucy, flip and hip spirit as unique in its way as that of its sister network, MTV: Music Television.

"We went out to the kids and we asked what we thought were the most innocuous questions, like what do you like about being a kid," Ms. Laybourne recalls. "And we got some pretty amazing and sometimes alarming answers."

"The Ren and Stimpy Show" made Nickelodeon's schedule on the strength of its pilot with kids.

Contrary to conventional wisdom, which holds that pre-teens can't wait to grow up, "We kept hearing from kids that they *didn't* want to be teen-agers," says Marshall Cohen, exec VP of research and planning for MTV Networks, which oversees Viacom's cable networks.

"We asked why, and they started talking about all these horrible things about teen-age life: drugs, AIDS, sex problems. They were worried about nuclear war, the environment, homeless people, their parents, and somewhere on that list they were worried about getting good grades."

So although Nickelodeon's programming for preschool kids, called Nick Jr., is similar to conventional kids' shows (except for "Nick Jr. Rocks," kids' music videos launched last fall), the network felt it needed a distinctive voice to reach school-age kids.

Rather than teach, preach and inspire, it decided it would provide escape and refuge: "Enjoyable, fun, a good, safe place on the TV dial for kids who are growing up in this kind of world—with a sort of us-vs.-them attitude," is how Mr. Cohen describes it.

Thus, on Nickelodeon game shows, kids get doused with green slime. On "Clarissa Tells It All," Clarissa relates the horrors of little brothers. On "You Can't Do That on Television," kids take verbal potshots at decidedly uncool parents.

This is all the result of a process unlike conventional program development: Producer comes in with idea; network OKs pilot; pilot is aired and tested; network accepts or rejects show.

Nickelodeon typically begins with focus groups in which it discusses rudimentary concepts for shows or even just brainstorms with kids.

There is an art to this, for the whole idea at Nickelodeon isn't to copy what's already on but to come up with new types of programs.

Nickelodeon has become the country's largest producer of original children's programming.

"You can't just ask, 'What's missing on your screen?' because they'll say nothing," says Geoffrey Darby, Nickelodeon senior VP-programming and production.

Rather, he says, "you go in and probe," and ask the targeted audience how they spend their time, what their favorite movies are, what videogames they're playing and the like. "From that we can get some hints" on directions worth pursuing, he says.

Then—once it decides on a type of show—Nickelodeon hires a producer to make a pilot and takes it back to focus groups again and again to get it right.

One focus-group finding, that kids like to be scared, sent the network off in search of a scary show that doesn't rely on blood and gore. The result, a live-action pilot called "Are You Afraid of the Dark?" soon will be shown to focus groups for their opinion, Mr. Darby says.

Sometimes Nickelodeon uses the same kids, called "expert groups," throughout the development process for a given show. That's what it did with "Double Dare," the game show that became such a hit the network syndicated it for what Ms. Laybourne has called "windfall profits."

Kids viewing the first "Double Dare" pilot said the show was "too predictable," because the phys-

(Continued on Page S-22)

Netting the numbers

While the Big 3 networks bemoan their loss of young viewers—NBC going so far as to bail out of kids' Saturday morning programming, effective next August—Nickelodeon's audience has been building.

As recently as four years ago, the major networks still commanded a substantially larger audience for kids' shows than Nickelodeon. Today, Nickelodeon claims more viewers of kids' programming than the three networks combined.

Among kids 2 to 11 years old, Nick's share has grown to 29%, or more than double the combined three networks' share, now just 14.6%, according to a Nickelodeon analysis of Nielsen Market Research figures.

Nick's share now approaches the 31.5% held by syndicated children's programming; four years ago, syndicated shows had a 48.7% share, three times Nickelodeon's.

Nickelodeon's knack with kids has been a long time in the making. When it began in 1979, it was a sober, commercial-free channel—some called it the "Eat-Your-Vegetables" station—usually thrown into the pot by cable systems bidding for city franchises.

It gradually built a reputation for innovative shows. But its revenues, limited to fees paid by cable systems, were insufficient for truly ambitious programming.

Success has spawned spinoff ventures, including a Nickelodeon toy line being introduced this month by Mattel at the American International Toy Fair in New York. A few years back, Green Slime Shampoo, based on the glop featured in a Nick game show, was a hot seller.

Nickelodeon President Geraldine Laybourne, a former schoolteacher, signed on as program manager in 1980. In 1984, large in debt and small in audience, Nickelodeon made Ms. Laybourne president and began carrying advertising.

"The first thing I did was say, 'Hey, we've got to involve kids in this process," she says. "We have to hear from *them* what's going on." □

—Joseph M. Winski

Advertising leaders in key kids markets

Top five category spenders by parent company

Rank	Jan.-Sept. 1991	1990	1989	% chg '90-'89
Computerized games and accessories				
1. Nintendo Co.	$17,862.1	$32,791.1	$16.457.7	99.2
2. Sega Japan	7,492.0	11,942.5	9,814.4	21.7
3. Acclaim Entertainment	3,500.9	5,522.8	2,787.2	98.1
4. Tiger Electronics	1,882.9	5,790.0	3,772.4	53.5
5. Ultra Software Corp.	1,382.0	1,971.7	1,011.1	95.0
Non-computerized games				
1. Hasbro	2,681.2	37,761.3	38,810.5	-2.7
2. Tiger Electronics	457.4	2,573.5	1,474.2	74.6
3. Western Publishing Group	248.0	6,669.1	3,872.0	72.2
4. Tyco Toys	210.1	1,512.3	1,190.4	27.0
5. Brown Group	179.5	189.5	85.2	122.4
Toys				
1. Hasbro	50,086.4	113,654.7	141,117.6	-19.5
2. Mattel	30,250.9	52,280.5	52,546.4	-0.5
3. Tyco Toys	18,428.8	47,641.0	32,684.7	45.8
4. Playmates Toys	13,908.6	15,069.0	4,648.0	224.2
5. Lewis Galoob	8,309.6	18,168.0	20,895.9	-13.1

Top five category spenders by brand

Rank	Jan.-Sept. 1991	1990	1989	% chg '90-'89
Computerized games and accessories				
1. Nintendo Super Entertainment system	$5,470.2	0.0	0.0	NA
2. Nintendo Game Boy software	5,014.3	3,001.7	1,327.4	126.1
3. Nintendo game software	4,974.7	13,592.5	10,289.6	32.1
4. Acclaim games	2,932.7	3,828.2	922.4	315.0
5. Sega games	2,829.0	3,488.7	2,885.7	20.9
Non-computerized games				
1. Milton Bradley Square One	553.2	0.0	0.0	NA
2. Milton Bradley games (general advertising)	484.9	1,678.9	1,410.1	19.1
3. Milton Bradley Scattergories	434.6	2,052.8	2,107.8	-2.6
4. Milton Bradley Taboo	325.0	2,202.2	0.0	NA
5. Tiger Toys' Noteability	247.0	1,733.0	0.0	NA
Toys				
1. Mattel's Barbie Collection	12,054.1	21,027.2	16,270.0	29.2
2. Playmates' Teenage Mutant Ninja Turtles	9,457.7	10,346.9	4,292.9	141.0
3. Mattel's Disney toys	6,621.7	4,778.1	2,410.4	98.2
4. Hasbro's G.I. Joe & accessories	5,849.8	11,815.5	11,758.0	0.5
5. Tyco radio control cars & trucks	3,785.1	6,562.7	4,552.4	44.2

Notes: Dollars are in thousands; fourth quarter 1991 figures are not yet available.
Source: LNA/Arbitron Multi-Media Service. Brands and category classifications are designated by LNA/Arbitron. Ad spending represents measured media only and includes magazine; newspaper; newspaper-distributed Sunday magazines; outdoor; network, spot, cable and syndicated TV; network and spot radio.

Advertising Age graph: Kimberly Mart

Nick 'addicted' to research

(Continued from Page S-2)

ical challenge always came last, Mr. Darby recalls. So the producers changed "Double Dare" to allow the grease-and-goo antics to occur any time. "It worked phenomenally well," he says.

Nickelodeon, which also tries to avoid sexual stereotyping, wanted "Clarissa Tells It All" to appeal to both boys and girls. Focus groups stressed that sibling rivalry is a big thing with kids. So Clarissa's scheming against her odious sib Ferguson, whom she calls "Ferg-face," is a recurring plot element.

Nickelodeon's faith in research—as well as its boldness and growing financial might—is amply demonstrated by the 90-minute Sunday block of animated shows it launched last August.

The easy, cheaper way would have been to borrow existing characters, as ABC did with rap singer Hammer and CBS with Teenage Mutant Ninja Turtles.

But Nickelodeon wanted to create truly new characters, so despite the high cost of animation—Ms. Laybourne says the network spent $40 million to develop the cartoons—it produced eight fully animated pilots.

Three of them—"Rugrats," "Doug" and "The Ren and Stimpy Show"—passed muster with the kids.

The shows as a group had the highest-rated debut of any program in Nickelodeon history. □

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News just for adults? Not according to Nick

This spring, Nickelodeon will unveil a news program for kids. Here are highlights of how the show came to be:

August 1989: Initially cold to news programming, saying that's "for adults," kids in a focus group OK news if done by Nickelodeon, because Nick would make it "cool and fun."

April 1990: Nickelodeon takes experts and producers to fourth-through-sixth-graders for a discussion of what a kids' news show should be.

November 1990: A 30-minute pilot is tested with four focus groups in two cities. Overall results are positive, but kids found the pacing too slow.

January 1991: War breaks out in the Middle East. Nickelodeon hires Linda Ellerbee's production company, Lucky Duck Productions, to do a special. Producers go into classrooms to ask kids what they want to know about the war.

February 1991: The 30-minute special airs. In April focus groups, kids say it told them what they wanted to know. The network hires Lucky Duck to produce a weekly half-hour news show, and in June commissions more specials. □

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Beleaguered 'Bazaar'

New hires aim to turn around fashion title

By Scott Donaton

Hearst Magazines' hiring of consultant Joseph Armstrong is yet another sign that Hearst is trying to whip *Harper's Bazaar* into shape.

Mr. Armstrong, former publisher of *Rolling Stone* and *New York Magazine*, was hired early this month to help restore the luster of the 125-year-old fashion magazine (AA, Feb. 3).

D. Claeys Bahrenburg, president of Hearst Magazines, downplayed the significance of the move, saying the company regularly hires consultants.

But the hiring of Mr. Armstrong, 47, comes just weeks after Hearst appointed Elizabeth Tilberis, 44, editor in chief of *Bazaar*. That sets the stage for an editorial battle between Ms. Tilberis, former editor of British *Vogue*, and Anna Wintour, editor in chief of *Vogue* and Ms. Tilberis' predecessor at British *Vogue*.

The changes made under Ms. Tilberis are expected to be so extensive "we're calling it a relaunch," said *Bazaar* Publisher Carl Portale. "This is a fairly large investment on the part of Hearst."

Changes will include a redesign and "another kind of [editorial] concept," he said. *Bazaar* also will increase its focus on culture, the arts and travel in addition to fashion. The June issue will be the first under Ms. Tilberis' direction.

Hearst executives are calling the anticipated changes a relauch.

Bazaar has been battered by the recession and growing competition. The 1985 launch of *Elle* and its subsequent head-to-head battle with Conde Nast Publications' category-leading *Vogue* squeezed *Bazaar* into third place in the field. Upstart *Mirabella* has intensified the competition.

"Traditionally, you had a two-magazine market, with *Vogue* and *Harper's Bazaar* dominating the fashion business," said Daniel McNamee, president of McNamee Consulting. "In recent years, *Bazaar* definitely got left behind. Now, it's at least a four-way duel."

Bazaar carried 1,051 ad pages last year, a 26.3% decline from the previous year. Ad pages fell 14.8% to 2,526 at *Vogue*; 23.3% to 1,762 at *Elle*; and 15.6% to 918.9 at *Mirabella*.

Bazaar also ranks third in circulation in the fashion field with a rate base of 700,000, behind *Vogue's* 1.1 million and *Elle's* 825,000 but ahead of *Mirabella's* 575,000.

Mr. McNamee believes the fashion field can't support four magazines, but said *Bazaar* might be one of the survivors.

"Hearst has got a lot of resources," he said. "If they go muscle their way in there, sure, they can take it back."

Mr. Armstrong was publisher of *Rolling Stone* in the mid-1970s, and later served as president, publisher and editor of *New York Magazine* and *New West*. In 1982, he launched the short-lived monthly *The Movies*, a forerunner to *Premiere*. Since then, he's worked as a media and marketing consultant for clients including Gannett Co.'s *USA Today*, Time Warner and Random House.

After *Bazaar*, Mr. Armstrong is expected to focus on *Town & Country*, also struggling. Like *Bazaar*, it has a new editor in chief, former *Philadelphia* Editor Ron Javers, 45. He succeeded Frank Zachary, who replaced Anthony Mazzola as editor in chief in 1972, when the latter moved to *Bazaar*.

Town & Country's ad pages declined 27.8% to 1,160 last year. □

TRACKING SHARES

Adults eye kids shows

NEW YORK—While ratings for children watching kids TV programming have fallen off dramatically in the past year, a surprisingly high number of adults appears to be watching kids shows.

Nielsen Media Research's special analysis of ratings last September found about one-quarter of all viewing of children's TV programming was done by households without kids.

ABC was the broadcast network with the greatest percentage of adult viewers in its kids programming audience, 26.1%. Fox Broadcasting Co. had the lowest percentage of any broadcast source (21.4% Saturday mornings, 17.6% weekdays).

Kids' viewing of Saturday morning children's programming fell 8% during Sept. 16 to Dec. 23 from the same period in 1990, according to an analysis of Nielsen data by N W Ayer, New York. Ayer attributed the decline to an increase in non-children's programming, which also gives adult viewers more Saturday morning options.

The falloff in Saturday morning kids ratings also might be due to more kids programming throughout the week on outlets including Nickelodeon, Ayer reported.

While the high percentage of adults watching kids TV shows is interesting, it's not very relevant for advertisers buying kids programming, said Deborah Solomon, VP-media research at J. Walter Thompson USA, Chicago.

"We evaluate children's TV shows for the kids that are watching. The adults are tertiary at best," she said.

But it could help advertisers targeting kids and adults.

"A lot of the products on kids shows—food products, athletic shoes and videogames—have broader audience than just kids," Ms. Solomon said. □

Some don't outgrow cartoons

Of all the TV households watching kids programs, adults-only households account for a surprising percentage, according to September figures.

Network	% of adults-only TV households
ABC	26.1%
NBC	24.3%
CBS	21.6%
Fox (Sat. a.m.)	21.4%
Fox (weekdays)	17.6%
Syndication	17.8%

Source: Nielsen Media Research, New York

Kids are watching less

Children 6-11 watched less Saturday morning programming in fourth quarter 1991 than the year before, according to an N W Ayer analysis of Nielsen Media Research data. The three networks lost ratings, while Fox and Nickelodeon improved.

Network	'90 rating	'91 rating
CBS	6.5	6.3
ABC	6.1	5.0
NBC	5.3	4.3
Fox	3.0	3.9
Nickelodeon	1.0	1.1
Total	**21.9**	**20.6**

Ratings for Sept. 16-Dec. 23. Source: N W Ayer, New York

NEWSSTAND

MEDIA WORKS

Advertising opportunities in print.

Endless Vacation, Indianapolis, "Colonial Mexico" and "Ecotourism" special editorial features, April issue; ad close: Feb. 14. B&w page: $13,650; color page: $18,200.

AutoWeek, Detroit, "Special truck issue" special issue, March 9 issue; ad close: Feb. 18. B&w page: $12,415; color page: $19,335.

Sportswear International, New York, "Marketing fashion in America" special editorial section, March 4 issue; ad close: Feb. 18. B&w page: $8,500; color page: $10,299.

Seventeen, New York, "Fresh looks for the poolside" special ad section, May issue; ad close: Feb. 20. B&w page: $31,270; color page: $45,320.

Sports Illustrated, New York, "Homeowners" special ad section, April 27 issue; ad close: Feb. 24. Color page: $36,390.

Life, New York, "Summer travel" special ad section, May issue; ad close: Feb. 24. Color page: $73,660.

AutoWeek, Detroit, "Automotive electronics" advertorial section, March 23 issue; ad close: Feb. 27. B&w page: $12,415; color page: $19,335.

Decorating Remodeling and **Kitchen & Bath Business**, New York, "Color and style guide to kitchens" special editorial section, June issue of *Decorating Remodeling* and April issue of *Kitchen & Bath Business*; ad close: Feb. 28. Color page for both sections combined: $58,900.

Modern Maturity, New York, "Texas" special edition, June/July issue; ad close: March 9. B&w page: $25,780; color page: $27,695.

Country America, Des Moines, Iowa, "Taste of summer" special ad section, July/August issue; ad close: March 13. Color page: $43,600.

People, New York, "50 most beautiful people in the world" special edition, May 4 issue; ad close: March 16. Color page: $110,960. □

Joe Mandese coordinates MediaWorks.

Liquor sales go dry

Recession, taxes blamed for 5.6% decrease

By Gary Levin

For the U.S. liquor industry, 1991 proved to be one of the worst years since Prohibition.

Just one of the top 10 distilled spirits brands—the low-price Seagram's gin—gained sales last year, according to *Impact*, an industry publication. And Bacardi rum, the No. 1 brand, had its worst sales slide since the 1940s.

Preliminary estimates show total liquor sales fell 5.6% to 147.1 million cases, due to price and tax hikes, the recession and a continued trend toward moderation in drinking.

Unit sales dipped just 0.3% in 1990 because retailers stocked up on inventory to avoid the tax and price hikes. The average volume from 1985 to 1990 was down 2.8%. Industry sales peaked in 1979.

"There's been a lot of trading down from premium brands," said Frank Walters, research director at *Impact*. "They took big price increases, which have hurt them."

Mr. Walters is calling the 1990s "the age of value," and predicts the lower-price segments of the beverage alcohol business will continue to outperform premium brands.

Impact estimates total 1991 retail sales at $15.5 billion.

Bacardi Imports, whose flagship rum is the top selling liquor brand overall, saw estimated sales volume plummet 10% last year.

Late last month, Bacardi named Lintas:New York to replace McCaffrey & McCall on its rum account and Bacardi Breezer rum-based cooler account, worth a combined $30 million in billings.

In terms of sales declines, "Bacardi is a real shocker," said Nicholas Furlotte, executive editor at Jobson Publishing Corp., another industry publisher.

"It's the first time since World War II that the brand is really down, and it is a very big decline," Mr. Furlotte said.

A Bacardi spokesman said the company posted record profits last year, in part due to the price hikes, but he wouldn't provide details.

Among other highlights, House of Seagram's Seagram's gin posted a 2.9% gain last year, despite an overall decline in the gin business.

The brand, which has proved especially strong in ethnic markets, has successfully broadened its franchise with new advertising, analysts say.

Ogilvy & Mather handles Seagram's gin.

Brown-Forman Corp.'s Canadian Mist whiskey posted a steep percentage decline, falling 8% to 3.35 million cases, while Heublein's popular-price (and little advertised) Popov vodka beat the industry average, dipping just 2.3%.

Sales growth of Carillon Importers' Absolut vodka, one of the few success stories of the 1980s in the liquor industry, slowed again last year, though the brand scored a 2.6% volume gain, in part from increases for its citrus-flavor Absolut Citron.

Jim Beam Brands Co., which bought marketing rights to seven popular-price brands late last year from House of Seagram, is betting on continued strength in that segment.

But Seagram has employed a different strategy by focusing on the upper end of the business.

"Seagram is betting that when the economy bounces back, consumers will go back into premium brands," *Impact's* Mr. Walters said. □

Tough year for liquor brands

Only one of the top 10 liquor brands had sales growth in 1991, according to preliminary estimates, as a federal excise tax, price hikes and declining consumption hurt sales.

Rank	Brand	Marketer	'91 sales	% chg	Market share
1	Bacardi rum*	Bacardi Imports	7,055	–10.0	4.8%
2	Smirnoff vodka	Heublein	6,090	–7.0	4.1%
3	Seagram's gin	House of Seagram	4,100	2.9	2.8%
4	Seagram 7 Crown	House of Seagram	3,930	–6.4	2.7%
5	Popov vodka	Heublein	3,755	–2.3	2.6%
6	Jim Beam	Jim Beam Brands	3,515	–6.5	2.4%
7	Canadian Mist	Brown-Forman	3,350	–8.0	2.3%
8	Jack Daniel's	Brown-Forman	3,250	–5.0	2.2%
9	E&J brandy	E&J Gallo Winery	2,490	—	1.7%
10	Absolut vodka**	Carillon	2,455	—	1.7%

Sales are in thousands of cases. *Excludes premium black rum. **Excludes Citron and Pepper brands.
Source: IMPACT Databank

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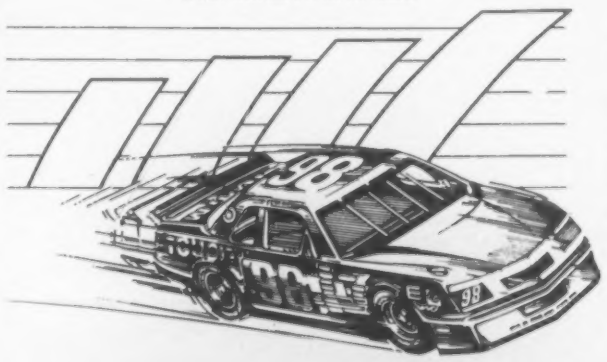

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United Distillers shutters unit

By Gary Levin

United Distillers North America has reorganized its liquor business, leaving the agency lineup in doubt.

Amid an industrywide sales slump, the Guinness unit last week said it will close Schenley Industries and move its premium brands, including Dewar's White Label and Pinch scotches, into Schieffelin & Somerset Co., a joint venture between Guinness and Louis Vuitton Moet Hennessy.

Guinness will also create a second unit, to be called Glenmore United Distillers. It will market all of the company's popular-price brands, including some now at Schenley and virtually all of those at Glenmore Distilleries, which will be merged with the new unit. Guinness acquired the company last year.

The reorganization won't affect agency assignments since all brands will remain under the Guinness umbrella and, in most cases, continue with the same brand managers, said Peter Baillie, a Guinness spokesman.

But agency executives expect an eventual consolidation.

Leo Burnett USA, Chicago, handles the Schenley brands except for Pinch, now at Grey Advertising, New York; Grybauskas & Partners has Glenmore; and Smith/Greenland, Kirshenbaum & Bond and Avrett, Free & Ginsberg share Schieffelin's account.

In 1990, United Distillers spent an estimated $40 million on measured media, according to LNA/Arbitron Multi-Media Service.

Schieffelin management will remain intact, but marketing management at Glenmore United Distillers hasn't been named, Mr. Baillie said.

Ian Vale, senior VP-marketing at United Distillers, will name those executives as the reorganization is implemented during the next nine months.

Although a major force in worldwide distilled spirits, United Distillers has no brands among the top 15 in the U.S.

Its largest-selling brand is Gordon's vodka, marketed by Schenley, which fell 10.6% in case sales last year and now ranks 17th among all brands, according to figures from Jobson Publishing Corp. Sales of Dewar's fell 7.2%, and Gordon's gin dropped 6.7% amid an industry slump in which a only a few brands are showing even modest increases.

Among other United brands, Skol vodka fell 15.2% in volume, Johnnie Walker Red Label scotch dipped 8.8% and Tanqueray gin dropped 8.3%, Jobson said. □

Crash

(Continued from Page 1)

snap back together. They can also be strapped into seat belts to avoid breaking up.

Bozell, New York, handles Tyco's $40 million account.

A typical 15-second TV spot starts with one animated dummy saying to another as they're driving in a car: "I feel like a wreck!" The other one replies: "OK!"" Together they deliberately crash into a tree and break into pieces. All six spots end with the message: "Don't you be a dummy. Buckle your seat belt."

Tyco hopes to get a jump on what's expected to be a highly competitive year for boys' action figures in the $13.5 billion toy industry.

"Action figures are going to be a particularly hot area for all toy marketers this year, because although demand for the Teenage Mutant Ninja Turtles is still strong, that phenomenon is 5 years old and there's room for fresh entrants," said David S. Leibowitz, a toy analyst of American Pine Securities.

The line was created under a licensing agreement with the U.S. Department of Transportation, whose crash dummies Vince and Larry appear in public service announcements sponsored by the department and the Advertising Council. The PSAs are created by Leo Burnett USA, Chicago.

"We don't think there will be a problem, as long as the world continues to look at our Vince and Larry public service announcements as completely separate from the advertising for these crash dummy toys," said Brad Lynch, the Ad Council's public relations director. "The fact that Tyco's commercials are animated, for the most part, should help keep the two campaigns distinct, and our hope is that the toy will ultimately increase the awareness of safety among young people." □